



One complete system

**The world-leading wealth
management system**



Not all systems are created equal

NavOne is the world-leading wealth management system developed by Touchstone and powered by Microsoft's business software platform – Dynamics Business Central.

Used by small to large organisations operating across the wealth management sector in over 30 jurisdictions, NavOne is one complete system that increases operational efficiencies and reduces administration costs.

When you choose NavOne you gain much more than a software system. You join a community of wealth management and IT professionals who are committed to improving standards and operating practices across the industry.

We work closely with our customers to identify emerging trends and business needs, a feedback loop that has enabled us to continuously develop NavOne over many years to ensure it meets the evolving needs of the industry.

NavOne is an enterprise-wide system that supports your business today and grows with you as you expand. It is a modular system so you can start with just the modules you need, and add more as your business expands and diversifies.

Touchstone is a Microsoft Gold Accredited Partner, and has achieved 'Certified for Microsoft Dynamics' status for its ISV solution, NavOne. The business focuses on the wealth management sector and has done so since 1997. Touchstone is our leading partner in this market with a wealth of references and business and technical expertise. They are a supplier with real pedigree, knowledge and a fantastic reputation.

Vanessa Kyte
Solution Sales Director,
Microsoft Dynamics

NavOne helps you



Deliver better service

- Manage every aspect of your client relationships and investment portfolios, even for the most complex structures
- See a 'single source of truth' for all your client and enterprise data, so you can always find the information you need
- Regular updates released every year, so you stay current with the latest wealth management best practices



Stay on top of your regulatory obligations

- Easy navigation means all your client and enterprise data is only a click away
- Our experienced consultants understand the regulatory environment and implement requirements accordingly
- CRS/FATCA and Automatic Exchange of Information included as part of the core application



Stand out from the crowd

- Provide efficient and informed service
- Respond faster to client enquiries
- Deliver a broader range of services to meet the complex needs of all your clients



Work the way you want to

- Customisable user interface, so you can tailor it to reflect your own business processes, terminology and branding
- Powerful workflow features let you create data flows and approval processes that speed up the pace of your business



Transition smoothly with seamless integration

- Our consultants are expert in planning and conducting migrations from legacy systems to NavOne
- Our implementation methodology and data migration tools ensure a fast and trouble-free switchover – whatever your current system
- Our wide range of training options means we can deliver the right mix of training for your users
- Your users will instantly feel at home with NavOne, thanks to its familiar Microsoft interface



Grow your business and monitor progress

- Scales with you as you expand your client base, introduce new services and manage a broader range of assets
- Deliver key management information at a click of a button



Streamline and reduce operational costs

- One complete system for your entire business means you spend less on IT as you have just one software supplier who understands your business
- Helps streamline your business processes, so your experts don't waste time chasing up information or re-keying data into different systems









Access the latest industry insights

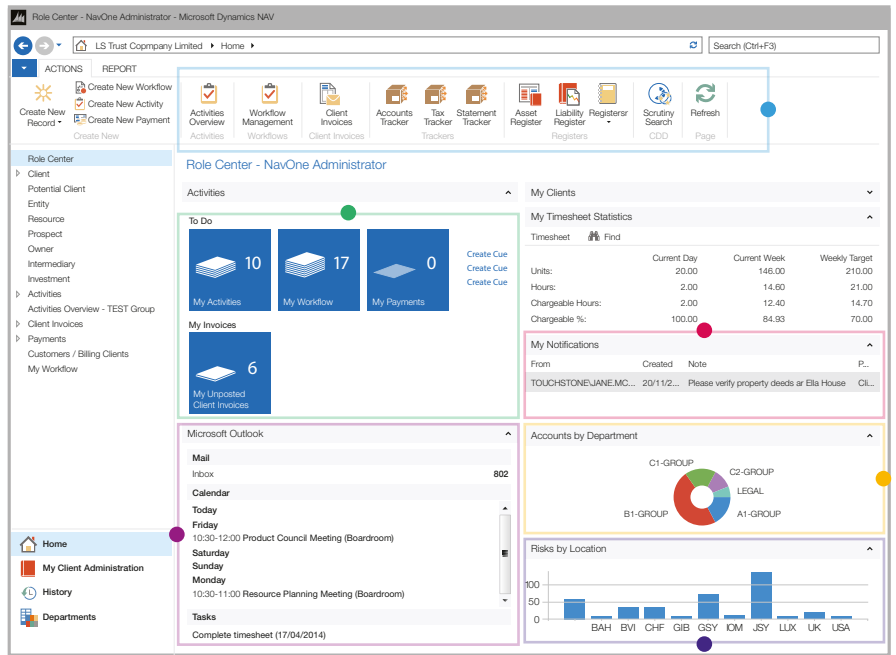
- We work closely with the wealth management industry to develop new features that improve business management and ease regulatory compliance
- Customisations requested by one client can be incorporated into the next version of NavOne, so all clients can benefit
- Regular training and user forum events are held which give you the chance to meet other NavOne customers from around the world



Gain peace of mind in your investment

- Powered by the latest Microsoft Dynamics Business Central platform, means you benefit from the unrivalled combination of Touchstone's industry expertise and Microsoft's billion-dollar investment in ensuring its technology remains future-proof

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With NavOne you will enjoy a great user experience, driven by the latest technology tailored to the needs of the wealth management industry.

Here are some of the key new features that will be found with the NavOne system along with a screen shot of the new look home screen.

1.  Customised Role Centers – a great user experience
2.  Cues to help manage workload effectively
3.  Notifications where urgent action required
4.  Microsoft Outlook an integral part of the Role Center
5.  Charts for KPIs
6.  Risk management and Compliance monitoring
7. Efficiency gains from automated and quick entry accounting
8. Interfaces including cash and investment transaction imports
9. Portfolio and asset management
10. Automated payments
11. Transaction profiling and monitoring
12. Document production and structured document filing
13. Monitoring of utilisation and profitability
14. Flexible fee calculation methods, and invoice production
15. Automated fee collection
16. Robust and comprehensive data security



Seamless
integration



Reduced
operation costs



Better service
delivery



Supported
business growth





Touchstone is a world-leading provider of systems for the wealth management sector.

A team of highly qualified business, technical and training personnel provides software and consultancy services to businesses across the industry in over 30 jurisdictions.

We design our software and services with one aim: to help our customers become more successful.

All our consultants have extensive experience in the finance industry, so we understand the regulatory, business and IT trends that affect your operations.

Our focus is on building long-lasting and ongoing relationships with all of our clients to ensure they always get the best value from our software.

Touchstone is a Microsoft Partner with Gold competencies in Enterprise Resource Management and Customer Relationship Management. NavOne is Certified for Microsoft Dynamics.

Our relationship with Microsoft means that our clients benefit from the highest level of innovation and a deep understanding of the Microsoft Dynamics roadmap, as well as the support of Microsoft's considerable research and development commitment to future-proof technology.

Contact Touchstone today to see how you can benefit from NavOne.

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 [@TouchstoneOne](https://twitter.com/TouchstoneOne)

Or to find out more visit

 [touchstoneOne.com](https://www.touchstoneOne.com)

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